# EXPLORE GEORGIA®

# COVID-19 DASHBOARD

## November/December 2020

# COVID-19 DASHBOARD

This dashboard is intended to give an overview of the impact of COVID-19 on Georgia's tourism industry. In this dashboard, you will find the latest statistics for the state's tourism industry along with insights into visitor engagement with the Explore Georgia brand.

The Explore Georgia team is actively working to keep Georgia top of mind with visitors and prepare our state for a strong recovery.

The COVID-19 Dashboard will be retired in 2021. Please visit the Travel Industry COVID-19 Research & Resources landing page for the latest recovery forecasts, trends, and more.

# EXECUTIVE SUMMARY

## November/December 2020

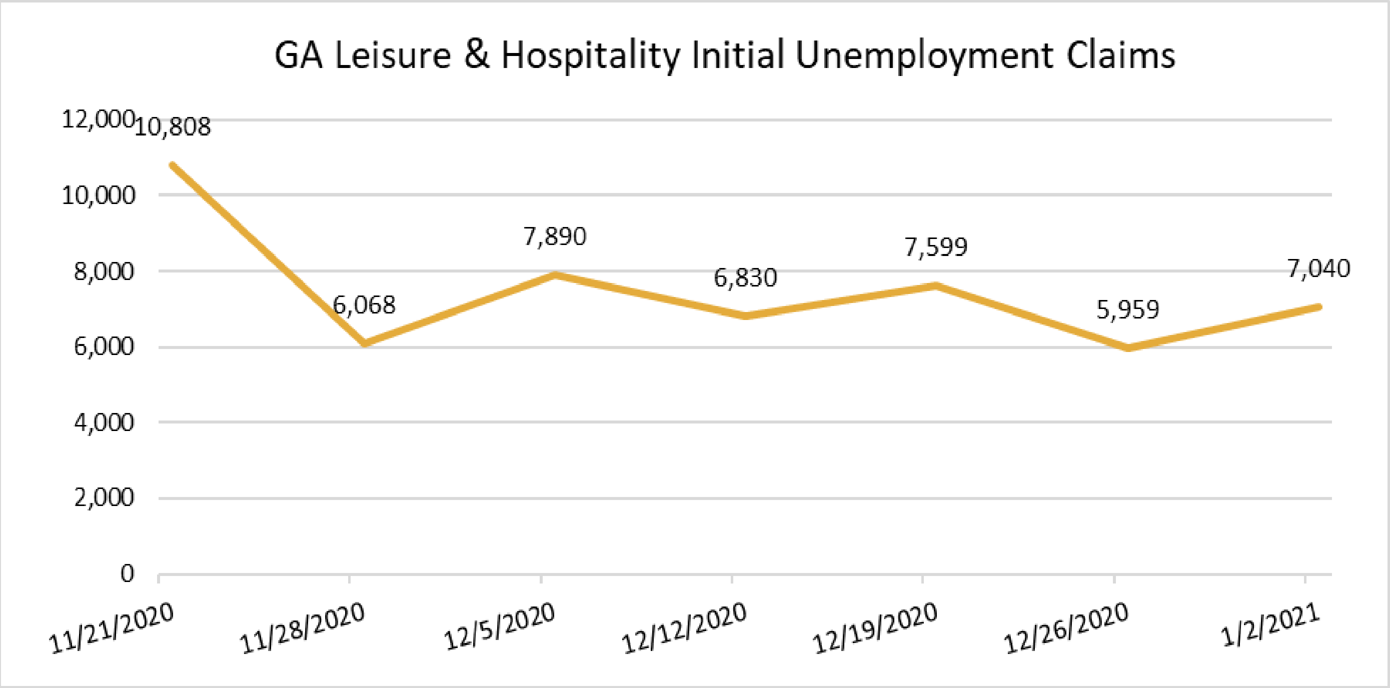
- Employment, travel spending, and visitation conditions all improved over the holiday season through the end of the year.
- While Georgia suffered YoY travel spending losses every month in 2020 which totaled $11.6 billion, November and December had the smallest relative losses since the onset of the pandemic in March. National travel spending was down $492 billion YoY.
- At the time of this dashboard's publication, the spread of COVID-19 is abating as vaccine distribution proliferates. While this has generated record-setting optimism and expectations amongst American travelers, and there is some opportunity to engage with Spring Break travelers, we expect these improved sentiments to translate into greater returns later in the year.
- As traveler sentiment and outlook continue to rise, ExploreGeorgia.org remains a top visitor resource, both in website visitation and engagement, consistently outperforming competitive DMO.
- In paid, owned, and now earned channels, we continue to see interest in Georgia – both from travelers and travel writers – and an on-going appetite for content and and interest in planning trips.

# GEORGIA’S TOURISM INDUSTRY: CURRENT STATUS

# GEORGIA UNEMPLOYMENT: NOVEMBER & DECEMBER

The unemployment rate in Georgia climbed from 4.5% in October to 5.7% in November, but dipped to 5.6% in December. In November and December, total Non-Farm Employment grew by 64,500 jobs, 10,400 (16%) of which were Leisure & Hospitality jobs. **By year's end, the L&H sector was 53,300 jobs short of February 2020 employment levels. This shortage accounted for 57% of all Non-Farm employment losses over the same time period.**

Weekly L&H Initial Unemployment Claim filings see-sawed through the end of the year, continuing to represent between 22% and 32% of all weekly IUC filings.

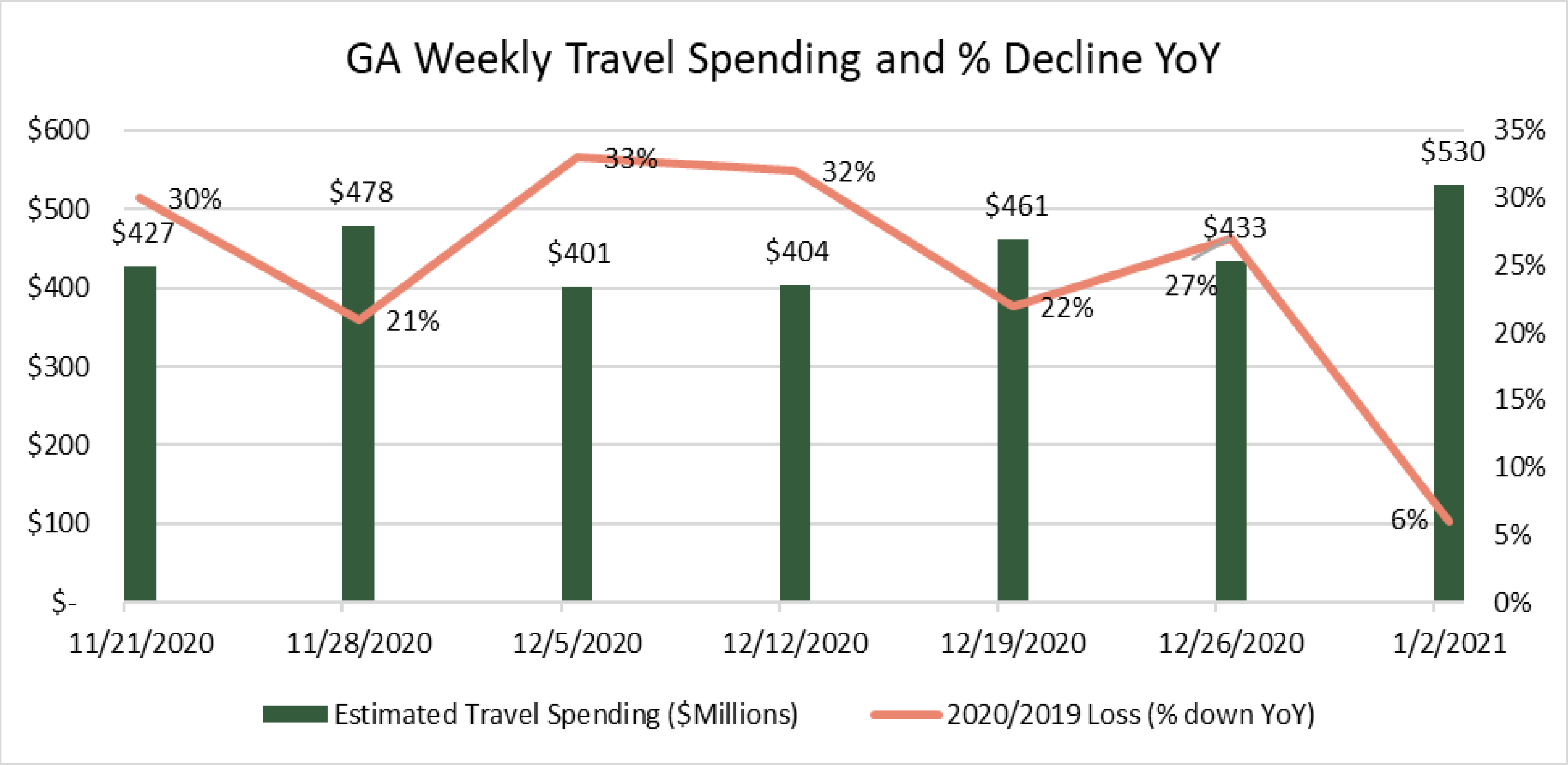





*Source: Georgia Department of Labor*

# GEORGIA TRAVEL SPENDING: NOVEMBER & DECEMBER

From the week-ending November 21, 2020, through the week-ending January 2, 2021, total estimated travel spending in Georgia was down $1.0 billion compared to 2019, bringing **total YoY travel spending losses to $11.6 billion.** Travel for the Thanksgiving, Christmas, and New Year's holidays yielded the three highest pandemic-period travel spending figures, despite the escalation of the winter COVID-19 surge. Weekly spending remained 74%-88% higher than the national average.

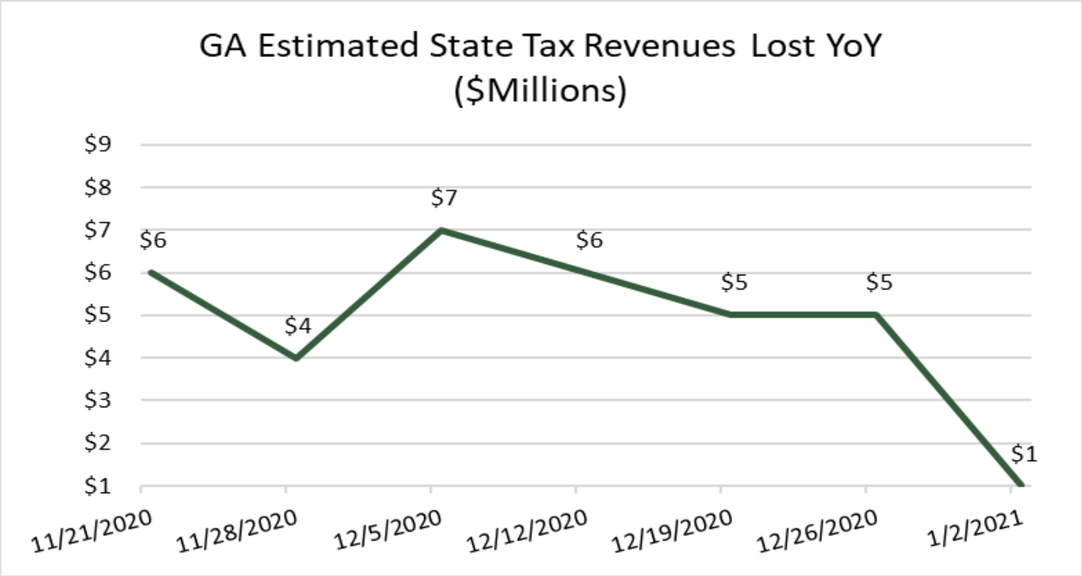


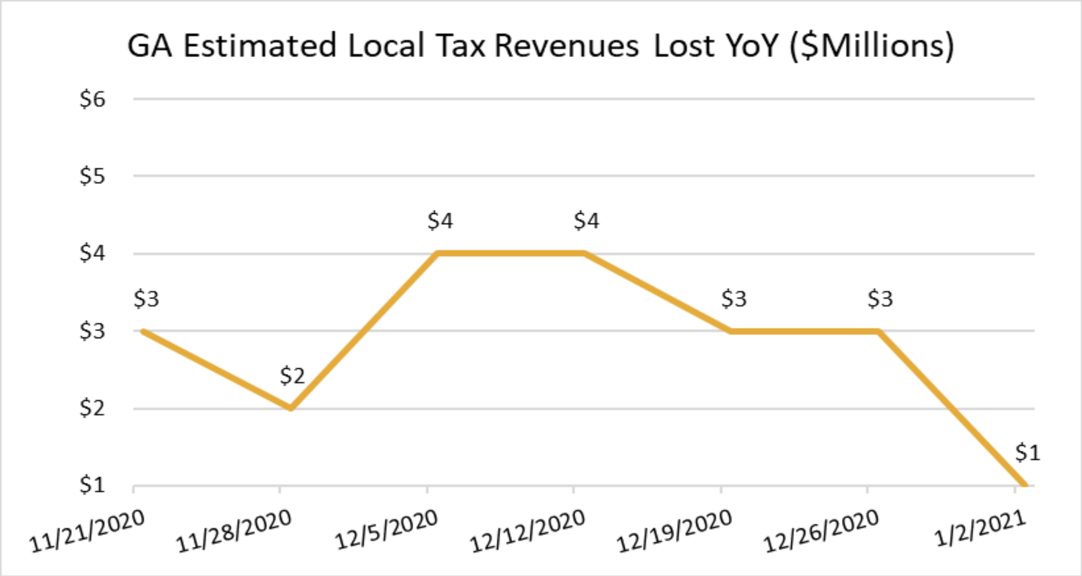



Source: Tourism Economics

# GEORGIA TAX REVENUES: NOVEMBER & DECEMBER

From the week-ending November 21, 2020, through the week-ending January 2, 2021, total travel-generated state and local tax revenues in Georgia were down $54 million compared to 2019, **bringing total YoY travel-generated tax revenue losses to $642 million.** As weekly travel expenditures experienced pandemic-period highs, weekly tax revenue losses posted pandemic-period lows.





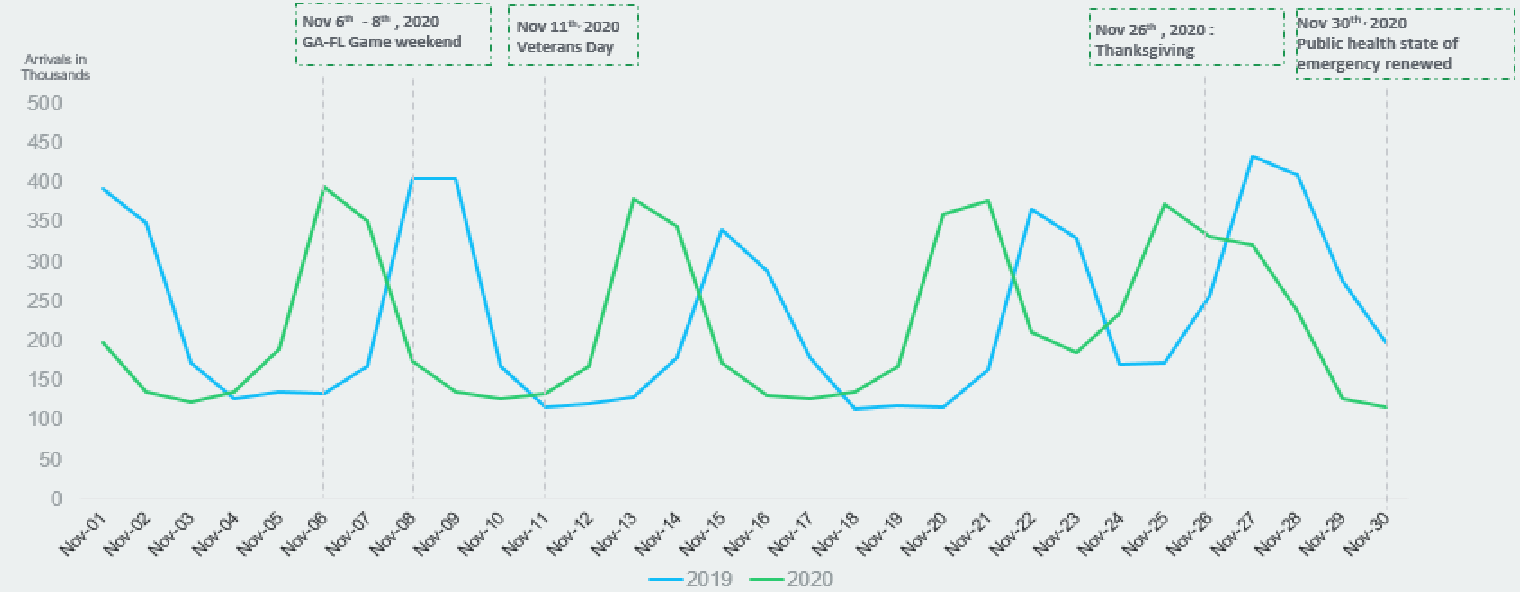

Source: Tourism Economics

# GEORGIA DOMESTIC VISITATION: NOVEMBER 2019 & 2020

In 2019, 10.8% of trips* to/within Georgia occurred in November. In 2020, total daily arrivals were down 4.8% YoY, as COVID-19 cases began to spike and tempered the traditional start of the the holiday travel season.

**Balanced Panel Arrivals:** November Weekly Comparison

What is the weekly percentage change in arrivals during COVID19 outbreak period?




| | | | | |
|---|---|---|---|---|
| YOY △ (Week 2020 vs Week 2019) | -1.3% (11.1-11.7 vs 11.3-11.9) | 9.0% (11.8-11.14 vs 11.10-11.16) | 6.3% (11.15-11.21 vs 11.17-11.23) | -1.0% (11.22-11.28 vs 11.24-11.30) |
| WOW △ (2020 Week over week) | - | -4.2% | 0.7% | 28.7% |

Date Ranges: 11.01 – 11.30 | Data Compiled: 3.4.2021 | Balanced Panel | Destination: Primary

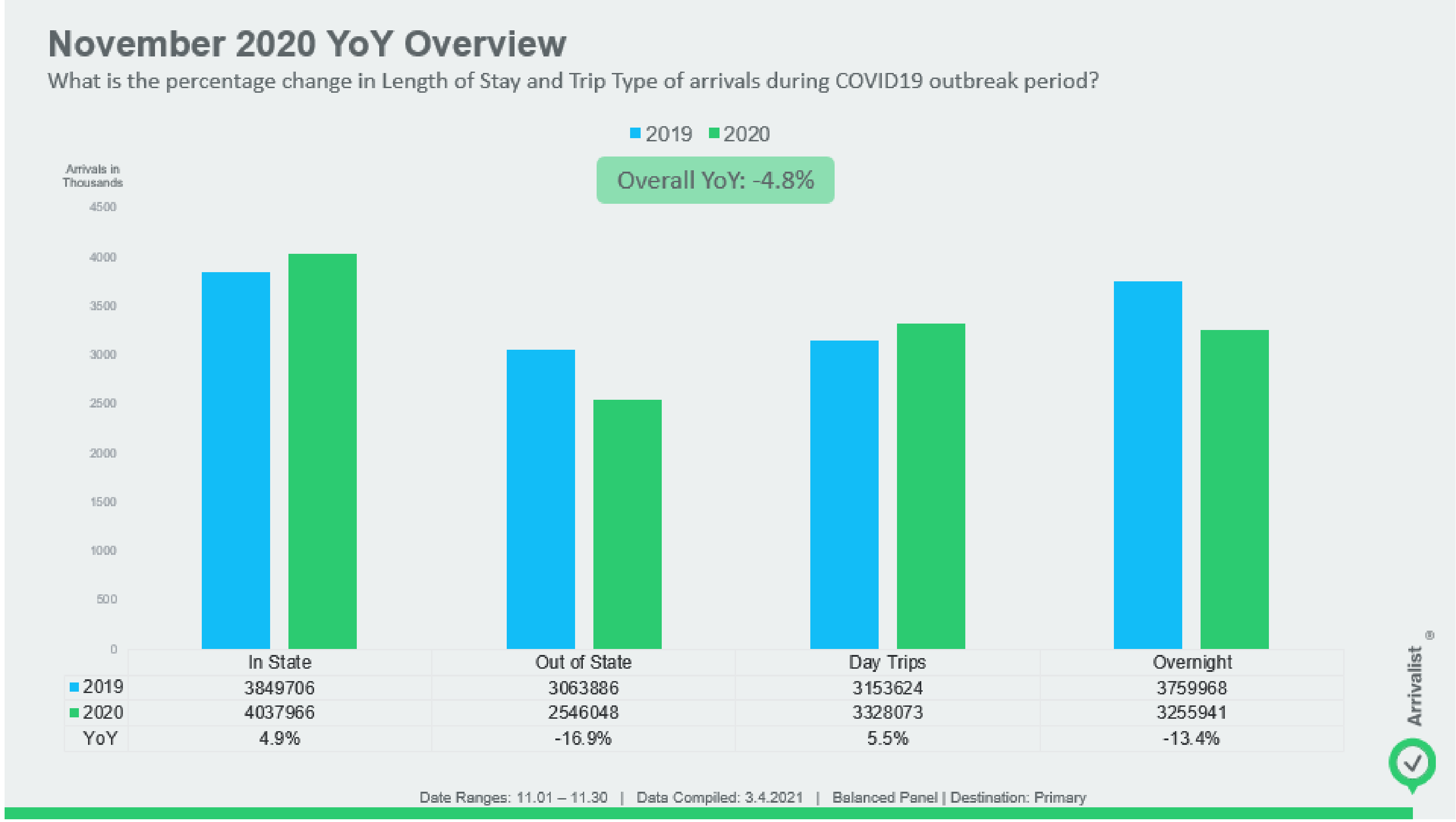


Source: Arrivalist

*Arrivalist tracks a representative panel of American travelers using GPS data from their mobile devices. They define a trip as someone (not a commuter) venturing >50 miles from home , and spending ≥ 2 hours and the majority of their trip in the arrival zone.

# GEORGIA DOMESTIC VISITATION: NOVEMBER YOY

While travel demand for in-state and day trips remained strong, resulting in YoY gains for those segments, out-of-state and overnight trips remained depressed compared to 2019, and total arrivals fell YoY.



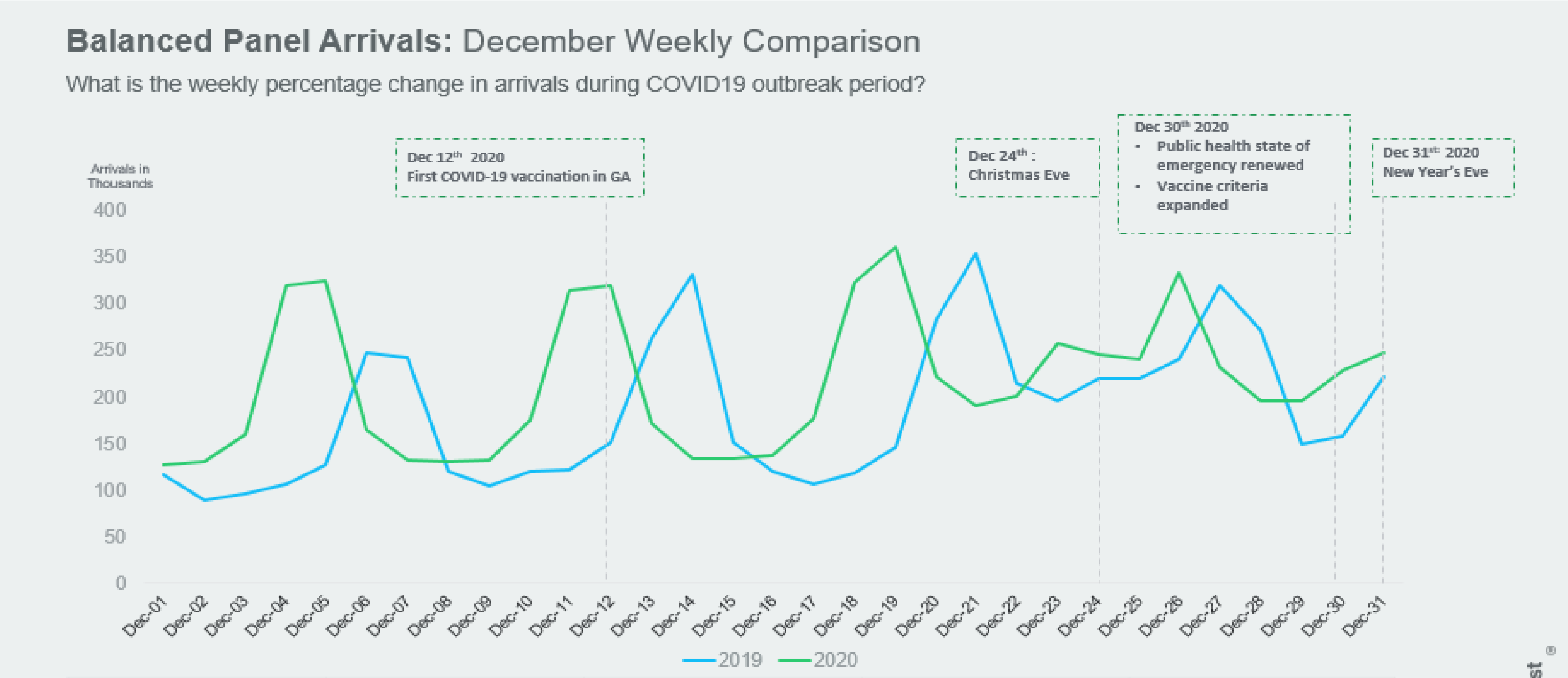

| | In State | Out of State | Day Trips | Overnight |
|---|---|---|---|---|
| 2019 | 3849706 | 3063886 | 3153624 | 3759968 |
| 2020 | 4037966 | 2546048 | 3328073 | 3255941 |
| YoY | 4.9% | -16.9% | 5.5% | -13.4% |

Source: Arrivalist

*Arrivalist tracks a representative panel of American travelers using GPS data from their mobile devices. They define a trip as someone (not a commuter) venturing >50 miles from home , and spending ≥ 2 hours and the majority of their trip in the arrival zone.

# GEORGIA DOMESTIC VISITATION: DECEMBER 2019 & 2020

In 2019, 9.0% of trips* to/within Georgia occurred in December. In 2020, total daily arrivals were up 16.1% YoY, with more visitors remaining in-state for the holidays as the second COVID-19 wave surged.




| | | | | |
|---|---|---|---|---|
| YOY △ (Week 2020 vs Week 2019) | 30.0% (12.1-12.7 vs 12.3-12.9) | 9.3% (12.8-12.14 vs 12.10-12.16) | 8.9% (12.15-12.21 vs 12.17-12.23) | 8.0% (12.22-12.28 vs 12.24-12.31) |
| WOW △ (2020 Week over week) | - | 1.5% | 12.1% | 10.4% |

Date Ranges: 12.01 – 12.31 | Data Compiled: 3.4.2021 | Balanced Panel | Destination: Primary

Arrivalist®

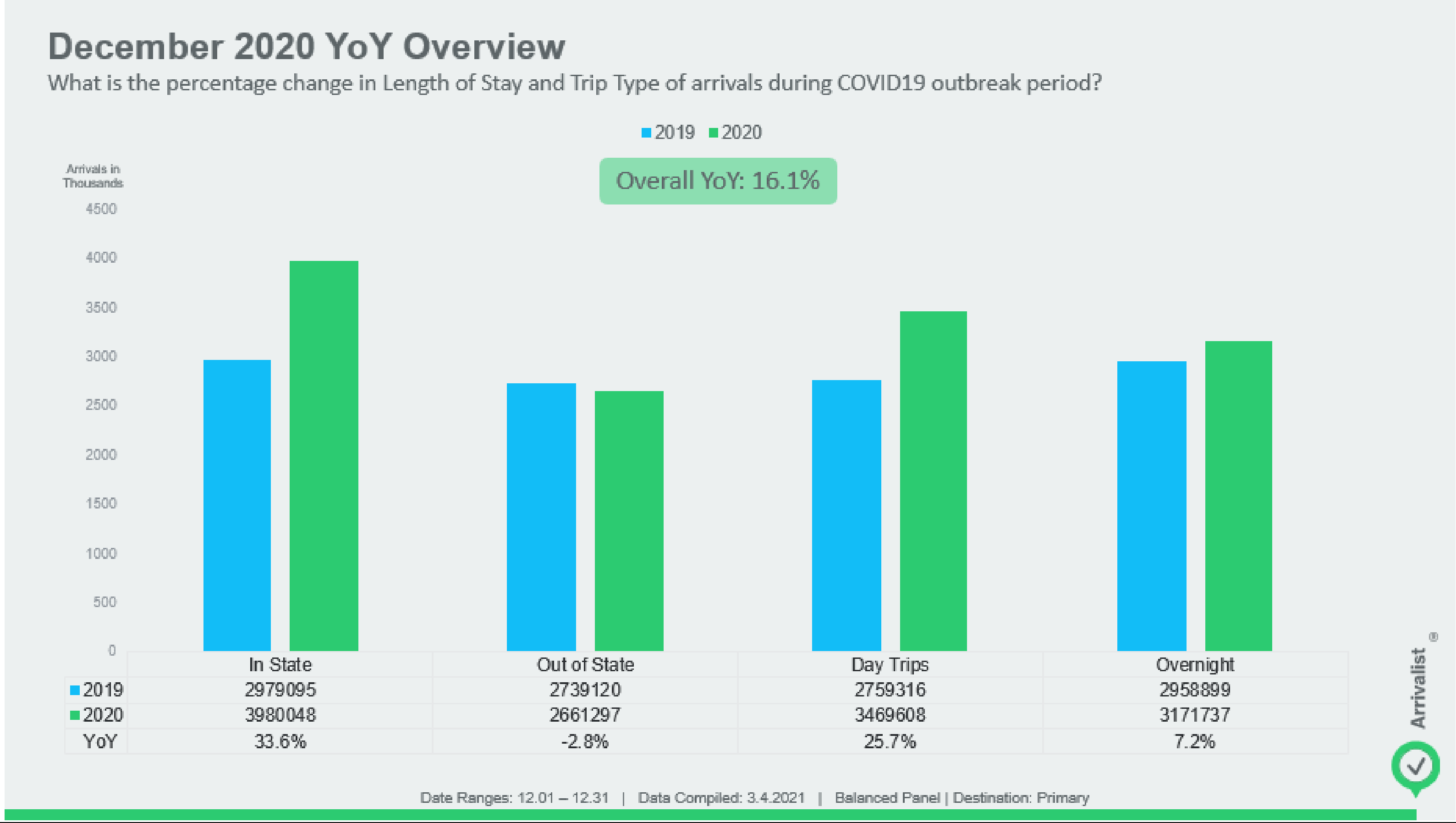


*Source: Arrivalist*

**Arrivalist tracks a representative panel of American travelers using GPS data from their mobile devices. They define a trip as someone (not a commuter) venturing >50 miles from home , and spending ≥ 2 hours and the majority of their trip in the arrival zone.*

# GEORGIA DOMESTIC VISITATION: DECEMBER YOY

As a result of strong demand for safer, closer, holiday travel options, total trips* in December were up YoY. While out-of-state travel remained depressed compared to 2019, all other segments experienced YoY gains.




| | In State | Out of State | Day Trips | Overnight |
|---|---|---|---|---|
| 2019 | 2979095 | 2739120 | 2759316 | 2958899 |
| 2020 | 3980048 | 2661297 | 3469608 | 3171737 |
| YoY | 33.6% | -2.8% | 25.7% | 7.2% |



*Source: Arrivalist*

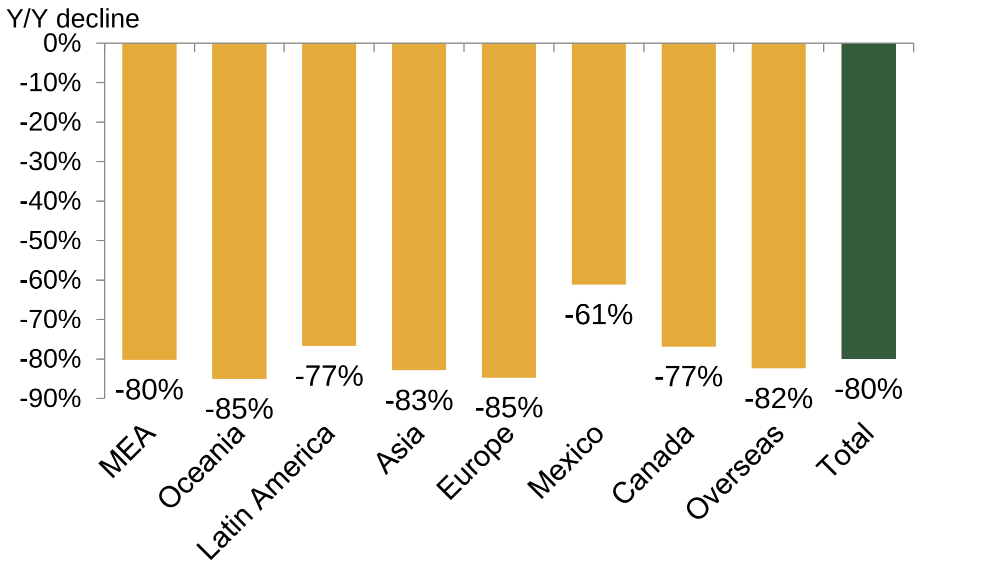
**Arrivalist tracks a representative panel of American travelers using GPS data from their mobile devices. They define a trip as someone (not a commuter) venturing >50 miles from home , and spending ≥ 2 hours and the majority of their trip in the arrival zone.*

# GEORGIA INTERNATIONAL VISITATION: 2020 IN REVIEW

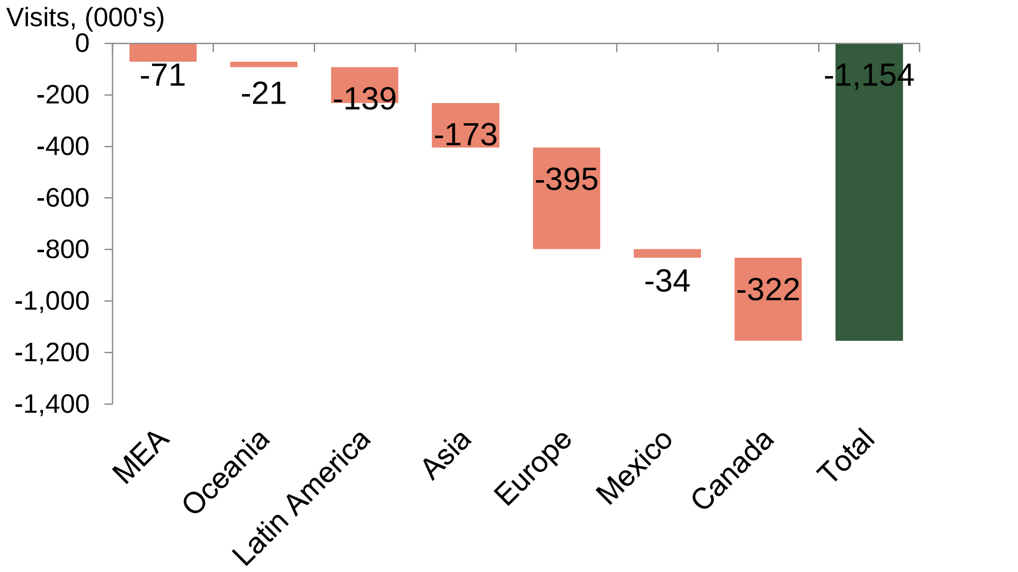
While data is still being finalized, current estimates are that in **Georgia registered an 80% decline (-1,154,000 arrivals) in total international visitation and a 78% decline (-$1.45 billion) in total international spending compared to 2019.**

These losses include an 82% decline (-799,000 arrivals) in Overseas visitation, a 77% decline (-322,000 arrivals) in Canadian visitation, and a 61% decline (-34,000 arrivals) in Mexican visitation.

**Declines in 2020 international visitation to Georgia**




**Declines in 2020 international visitation to Georgia**






*Source: Tourism Economics*

# GEORGIA INDUSTRY METRICS: LODGING AND FLIGHTS

In December, Georgia Hotel Rooms Sold and RevPAR were down 16% and 31%, respectively, compared to 2019. **Over the 2020 Calendar Year, Rooms Sold were down 26.5% YoY and RevPAR was down 41.3% in Georgia.** Still, Georgia outperformed the national average in terms of annual YoY impacts on Occupancy, Rooms Sold, Revenue, ADR, RevPAR, and Room Supply.

Also in December, passenger traffic was down 60.5% at Hartsfield-Jackson International Airport compared to 2019. **Total passenger traffic ended the year down 61.2% YoY, with international down 74.3% YoY, and domestic down 59.5% YoY.**

| | Nov. 2020 | Jan-Nov 2020 YTD | Dec. 2020 | CY 2020 Year End |
|---|---|---|---|---|
| Hotel RevPAR YoY | -39.1% | -42.1% | -30.7% | -41.3% |
| Hotel Rooms Sold YoY | -21.9% | -27.2% | -15.6% | -26.5% |
| | | | | |
| Domestic Passenger Traffic YoY | -57.9% | -59.5% | -59.1% | -59.5% |
| International Passenger Traffic YoY | -78.0% | --74.5% | -72.2% | -74.3% |
| Total Passenger Traffic YoY | -59.9% | -61.2% | --60.5% | -61.2% |



*Sources: STR, Inc.; Hartsfield-Jackson Atlanta International Airport*

# GEORGIA'S TOURISM INDUSTRY: CURRENT INDICATORS

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# CHECKING THE PULSE: TRAVELER SENTIMENT

- As vaccine distribution increases, travelers are experiencing pandemic-era optimism-highs and anxiety-lows
  - Now one year into the pandemic, expectations have finally flipped, with more American travelers feeling that the pandemic will get better in the next month rather than worse
  - Nearly 2/3 of American travelers are in a travel ready state of mind. Openness to travel inspiration is setting record highs week after week, and a record 71% of travelers daydreamed about, or worked on planning, travel last week
  - Just 35% of travelers say COVID-19 will impact their decision to travel in the next six months (vs. 66% last April)
  - People are feeling ever safer when it comes to the majority of travel-related activities (including flying, dining in restaurants, visiting museums and attractions, shopping, and staying in hotels and other lodging)
    - A majority still feel unsafe about international travel, conventions and large group meetings, travel by bus or motor coach on a group tour, train and bus travel, attending performances, and sporting events at large venues
- There is a growing understanding that even post-vaccine, things may not go back to "normal", which is not a deterrent
  - Nearly 2/3 of American travelers said they would still feel good or great if on their first trip post- vaccine, they were still required to wear masks, and 71% of them say they plan to still wear masks post-vaccination, regardless



*Sources: Destination Analysts; Longwoods International & Miles Partnership; MMGY Global; Skift Research*

# CHECKING THE PULSE: TRAVELER BEHAVIOR

- 84% of American travelers have tentative trip plans in the next six months, and over 1/2 are planning to take a trip within the next 3 months
  - Trips planned in March - May are on the rise as the forecast for widespread vaccine access moves up, but June - October are still the peak months for all tentative trip plans
  - Regional trips will continue to dominate, but around 25% of travelers intend to travel by plane by June
  - Those changing plans due to COVID-19 are still largely converting from fly to drive and from international to domestic
  - A strong preference for hotel lodging dominates within the next 3 months: 48% would prefer to stay in a hotel vs. 20% that would prefer to stay in a short-term rental (32% had no preference)
- Cities are now a top destination choice: among those planning to take leisure trips in the next 3 months, 39% expect to visit an urban destination (just outpacing small towns and beaches)
  - Florida is the most desired domestic destination this year, and Georgia is *the* gateway for anyone driving
- Nearly 1/2 of travelers employed by companies with business travel as part of their operations say that business travel has already resumed, and 1/3 of all travelers have spent time on vacation while working remotely away from home



*Sources: Destination Analysts; Longwoods International & Miles Partnership; MMGY Global; Skift Research*

# CHECKING THE PULSE: TRAVELER BEHAVIOR

- Spring Break:
  - 12% of American travelers have Spring Break plans
  - Among those planning to travel for Spring Break, over 1/2 plan to travel more than 500 miles for their trip, and more than 2/3 say it's important they visit a new destination for their trip
  - Only 30% of those who plan to travel have selected their destination or lodging, leaving 70% who could be influenced to choose Georgia
  - The places they're most likely to visit are small towns, beaches, national parks, and state parks, followed by mountains, cities, and theme parks
  - They're most likely to stay in either a luxury or 3/4 star hotel, and to travel by car



*Sources: Destination Analysts; Longwoods International & Miles Partnership; MMGY Global; Skift Research*

# WEBSITE

The holiday-driven months of November and December, drove positive YoY metrics. Sessions were up 81% YoY, and Partner Referrals were up nearly 75% YoY.

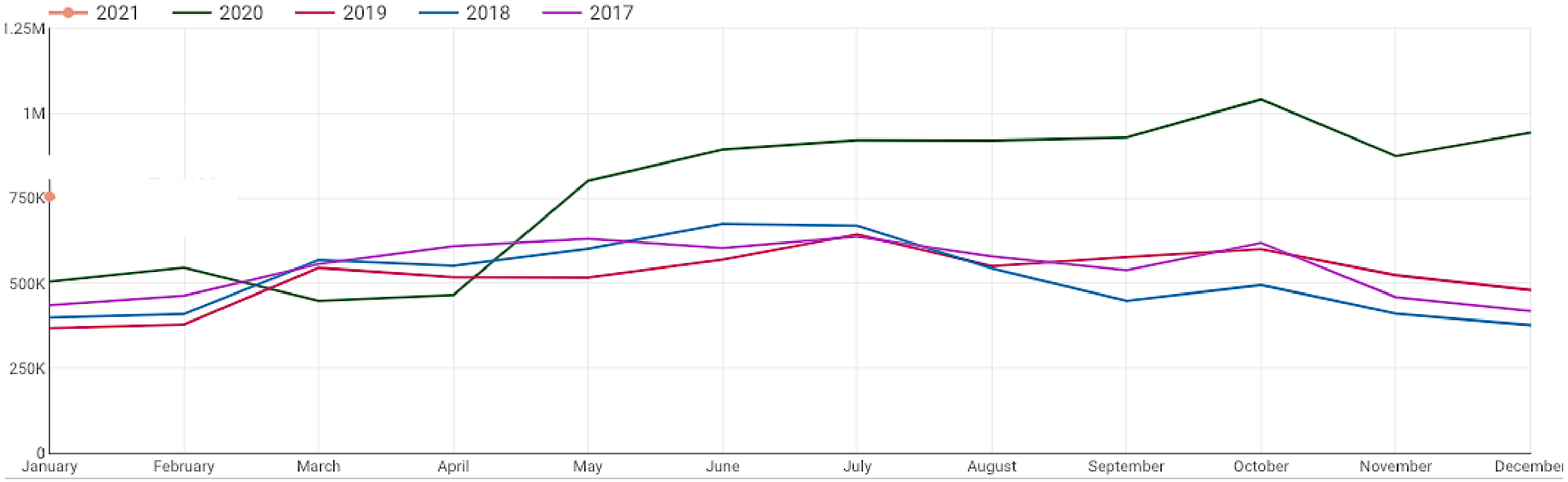
Visits were primarily driven by organic traffic, paid search, and organic referrals from our social media channels. Pinterest continues to be a growth channel for web traffic.

## Traffic, Engagement and Conversions

| | Sessions | Users | Pageviews | Avg. Session Duration | Bounce Rate | Pages / Session |
|---|---|---|---|---|---|---|
| | 1,816,584 | 1,488,288 | 3,333,614 | 00:02:10 | 44.6% | 1.84 |
| YoY % Change | 81.0% | 83.2% | 80.3% | 14.2% | -4.3% | -0.4% |
| MoM % Change | -7.8% | -3.1% | -17.3% | -12.8% | 3.0% | -10.3% |

| | Official Travel Guide Order | Official Travel Guide View | eNewsletter Form Submit | Guide Orders, Views and Downloads | Partner Referrals |
|---|---|---|---|---|---|
| | 5,830 | 5,762 | 3,423 | 13,828 | 324,733 |
| YoY % Change | 32.8% | 105.9% | 601.4% | 56.9% | 74.4% |
| MoM % Change | -60.1% | -56.2% | 300.4% | -53.5% | -36.8% |

## Sessions over Time

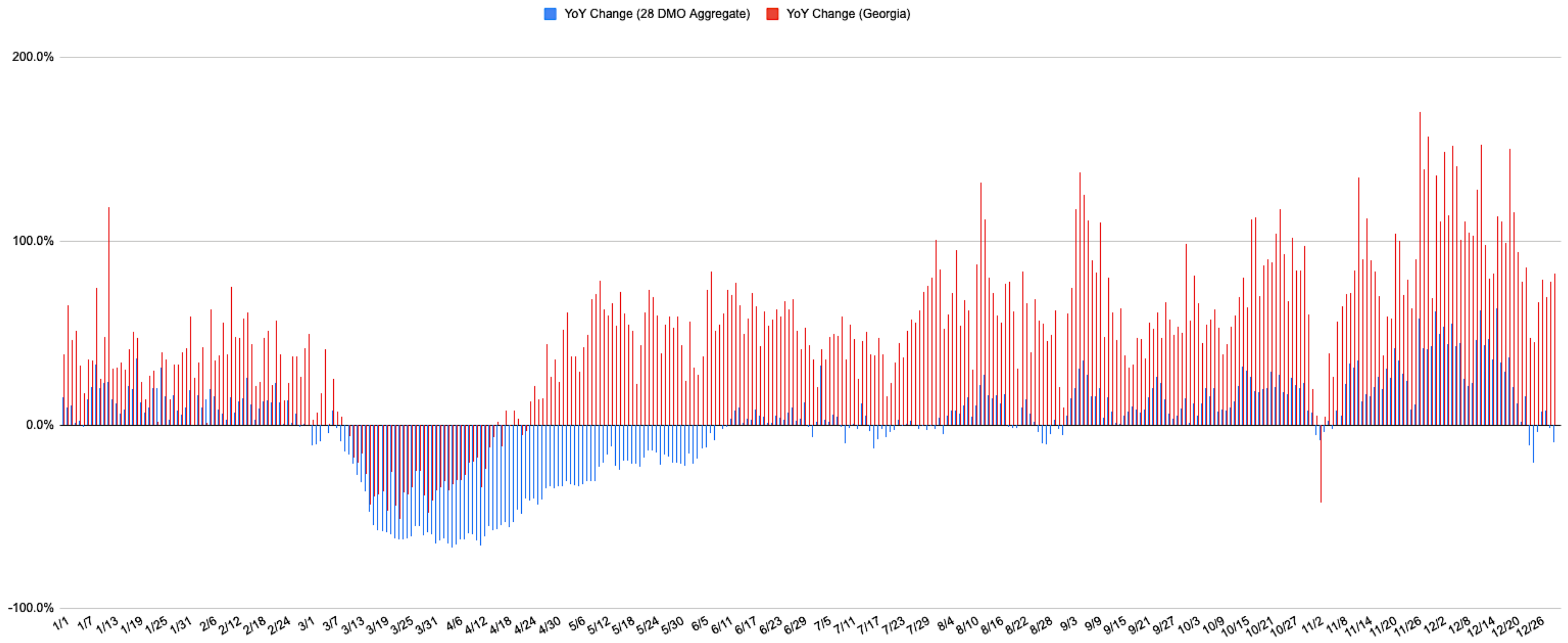





Source: Google Analytics

# WEBSITE

In a study of 28 DMOs, Explore Georgia continued its lead of quicker recovery and overall sessions during the same time period. Traffic volume experienced decreases in November, likely as a result of both the election (increased interest in politics) and the resurgence of COVID-19 cases, but had a strong rebound with holiday-related content.



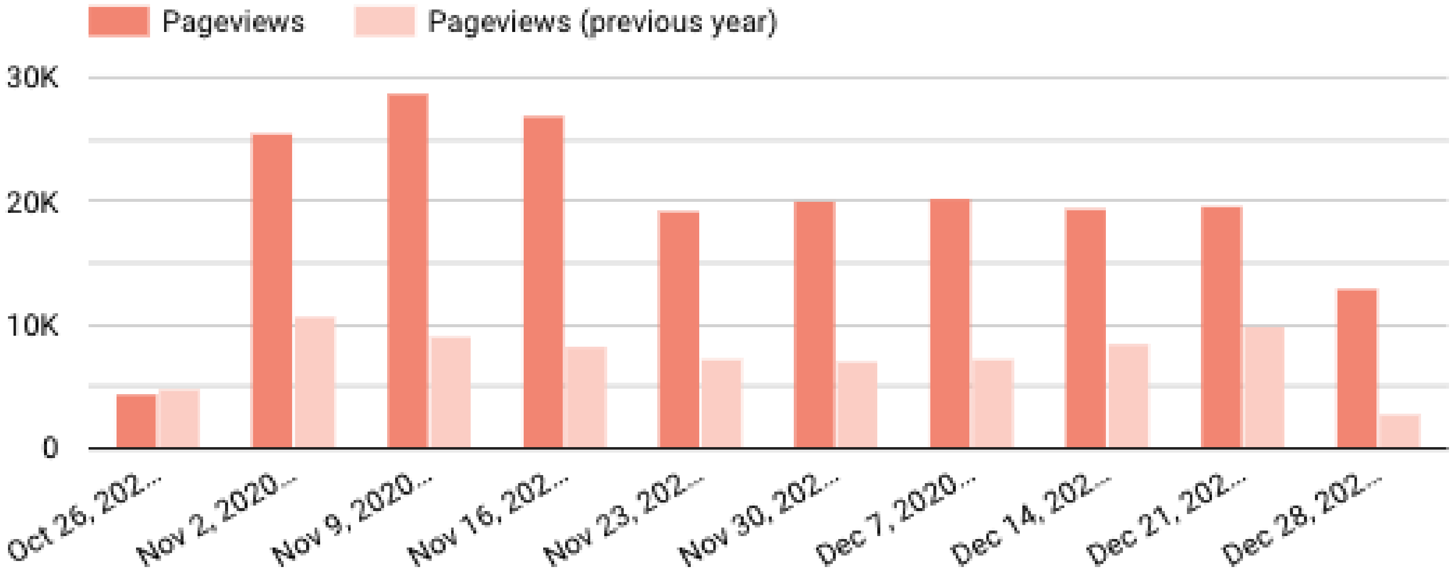



Source: Google Analytics

# WEBSITE: TRAFFIC

Beyond relatively flat traffic to the accommodations listings, the trend of WoW decreases in travel guide and partner referrals continued. However, much like overall website traffic, this content remains significantly higher, YoY. This is a strong indicator that travel planning continues to be relevant and important to our visitors, and underscores the importance of partners keeping their listings up-to-date.

**ExploreGeorgia.org: Accommodations Pageviews**

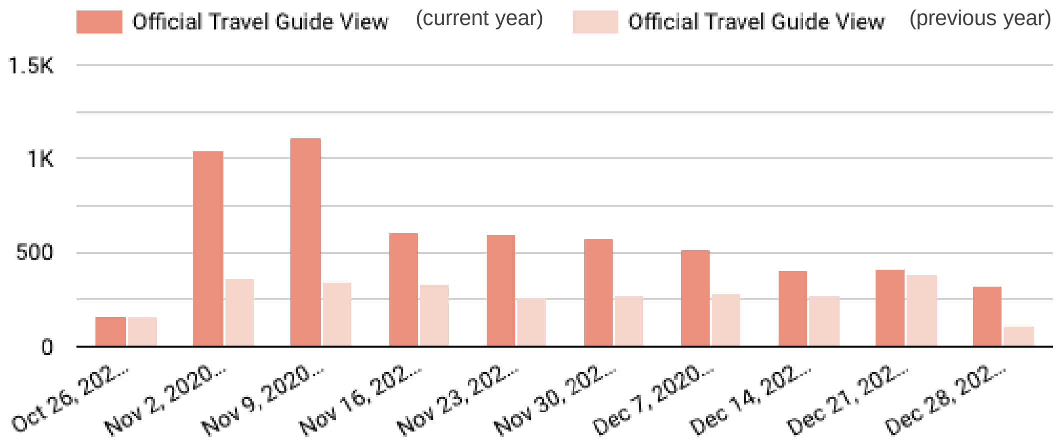




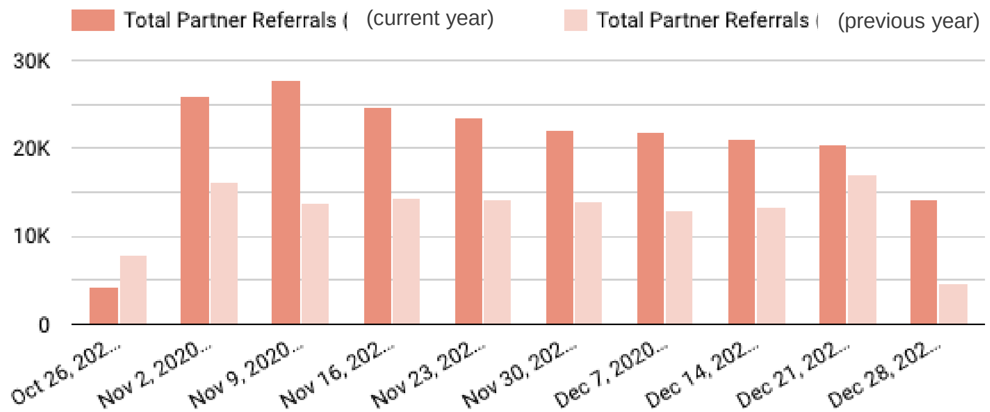

*Source: Google Analytics*

# WEBSITE: TRAFFIC

## ExploreGeorgia.org: Travel Guide Views




## ExploreGeorgia.org: Partner Referrals






*Source: Google Analytics*

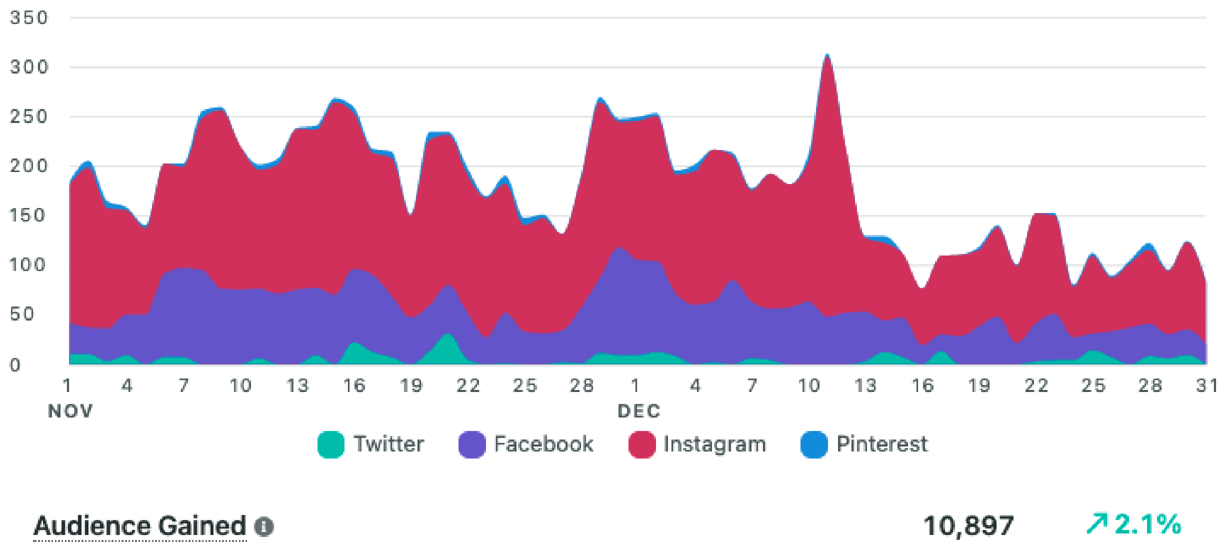
# SOCIAL MEDIA

During November and December, Explore Georgia social media channels' audience growth began to level out, though still positive. Pinterest continued to drive significant growth, with a 116% increase in followers, YoY.

Engagement rates continued to outperform benchmarks. Holiday-themed content remained strong, with top-performing posts for November and December matching those of the last report: [8 Small Towns that Do Christmas Right] and [10 Drive-thru Holiday Lights].

Holiday content outperformed the majority of content, across channels, especially holiday activities that included safety information.

## Explore Georgia Social Media Audience Growth (YoY)





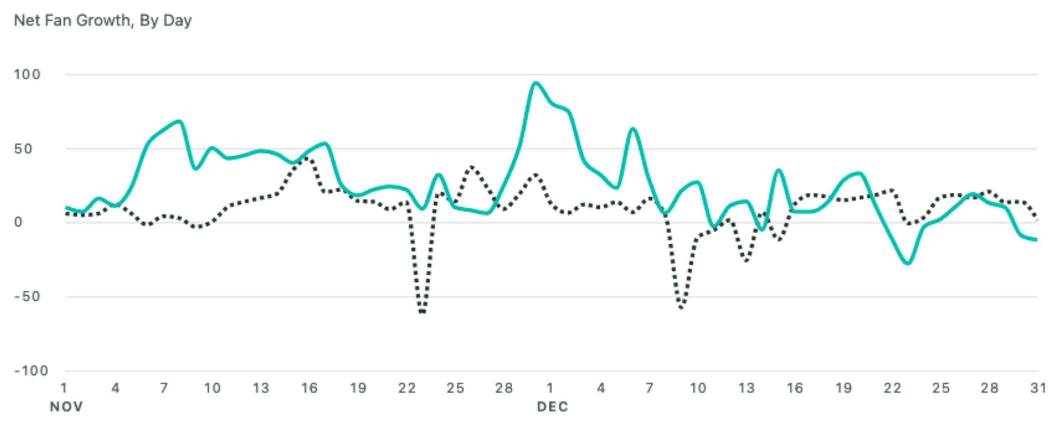

*Source: Sprout Social*

# SOCIAL MEDIA

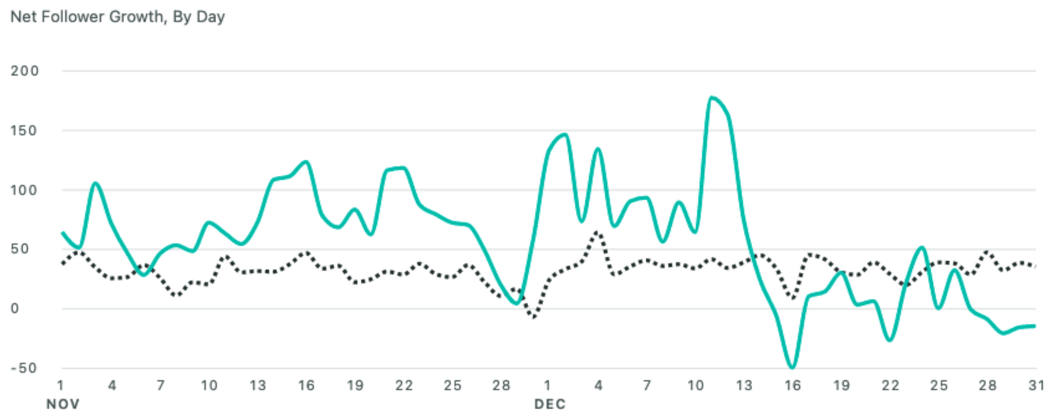
Recent platform changes have affected Explore Georgia's follower growth; however, audience engagement is still strong compared to our competitive set of state DMOs in the Southeast. On Instagram, Explore Georgia maintains its status as the second most followed state DMO in the Southeast (behind Florida), and number seven in the nation. On Facebook, Florida has more than twice the followers, but Explore Georgia experiences nearly three times the post engagement.

Explore Georgia is working with Miles to improve metrics as social media algorithms continue to evolve.

## Facebook




## Instagram




Explore Georgia

Competitor Average



*Source: Sprout Social*

# EARNED MEDIA

Much like the positive upticks in consumer travel sentiment, interest from writers picked up at the end of 2020, so Explore Georgia focused pitching on Georgia's "safecation" guides.

Packages were sent to nearly 70 new and existing media contacts, resulting in immediate coverage from Atlanta's CW and blog & podcast coverage from Ash Said It.

These efforts have already produced four placements, with multiple trips in the works.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## GEORGIA'S GREAT ESCAPES

Travel right now is....complicated. But, the good news is that in Georgia you can effortlessly adapt to the "new normal" at the many hidden gems and natural wonders, urban centers, and charming small towns.

Our new initiative, Georgia's Great Escapes, showcases how you can travel safely to five different types of destinations throughout the state - Atlanta, Savannah, Blue Ridge, Milledgeville and Thomasville - while following the state's Safety Promise - including wearing a mask, maintaining a social distance and washing hands.

When you're ready, we invite you to experience Georgia's Great Escapes and develop inspirational stories for your readers.

**We've already started packing a bag for you.**

You can learn more about Georgia's Great Escapes by reviewing our safecation guides at ExploreGeorgia.org/safecation-guides. And, if you're interested in planning a FAM trip, please contact Emily Murray at **emurray@georgia.org**.

QUESTIONS?

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